

THE RIGHT SIZE BUSINESS

Five-Star Loop Learning Lab Worksheet

Erik Devash | The Right Size Business



1 What should the business give you?

Write one honest answer. The goal is the right-sized business, not simply the biggest one.

2 See the complete Five-Star Loop



The review helps create the next lead.

Score each stage: 1 = inconsistent or owner-dependent. 5 = clear, repeatable and owned.

LEAD	Find it	1	2	3	4	5
CONSULT	Book it	1	2	3	4	5
SALE	Sell it	1	2	3	4	5
INSTALL	Deliver it	1	2	3	4	5
REVIEW	Earn it	1	2	3	4	5

Which stage is furthest from 100%? _____

Where does the owner still rescue the process? _____

3 Use the 1 : 1 : 3 team as a framework

1 : **1** : **3**
ADMIN : SALES : INSTALLERS

The owner may fill multiple roles. Every role must be covered.

Which role or roles are you currently filling? _____

TURN THE LOOP INTO ACTION

Start with the stage furthest from 100%

Erik Devash | The Right Size Business



4 Know the five numbers

Write the current weekly number. Compare each stage with the one before it.

LEADS _____	CONSULTS _____	JOB'S SOLD _____	VALUE QUOTED \$ _____	VALUE SOLD \$ _____
-----------------------	--------------------------	----------------------------	---------------------------------	-------------------------------

Where does movement stop?

5 Define focused execution at every stage

LEAD

We know where qualified leads come from and work those sources consistently.

CONSULT

We respond, follow up and work to get the consultation scheduled.

SALE

We review the proposal with the customer, ask for the sale and use a second voice to follow up.

INSTALL

The team has the information, equipment and standards to deliver clean, careful work.

REVIEW

The complete experience earns five stars and helps create the next lead.

6 The one action I will take Monday

STAGE _____

OWNER _____

ACTION _____

WHAT BETTER EXECUTION WILL LOOK LIKE

Do not try to fix everything at once. Improve one stage, then strengthen the handoff.